



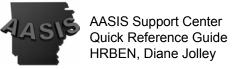
AASIS Support Center Quick Reference Guide containing

Quick Reference Cards (QRC)

for

HRBEN

Benefits Administration Version 4.2





Version Control Sheet

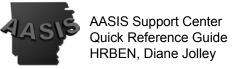
Course: HRBEN- QRG Guide

Courseware Items: Quick Reference Cards

Change Summary

Changes made to this document are summarized in the following table

| DATE | CHANGE | CHANGE REASON FOR CHANGE | |
|----------|--|---|----------------|
| 4/3/01 | QRC's developed and published | | |
| 07/17/02 | Updated to Version 2.0 | No changes to QRC's. Added to V2 Core Curriculum Only. | All in V2 Core |
| 08/27/02 | Updated to Version 3.0 - Combined QRC #1—5 in one Guide | Combined QRC's 1-5 in one Guide | All |
| 9/25/02 | HRBN0001 Not applicable for adding dependent with no change in deduction, updated to version 3.1 | Simplify process | 8 |
| 9/25/02 | Vendor will provide effective date of approved coverage, updated to version 3.1 | Expanded possible scenarios | 10 |
| 01/23/03 | Courseware updated to V4.0 | vare updated to V4.0 Basic change in all courseware docur | |
| 3/10/03 | QRG Guide updated on pages Q 11 and Q 12. | Updates in Courseware | Pages 11/12 |





Version Control Sheet

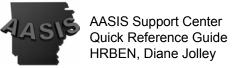
Course: HRBEN- QRG Guide

Courseware Items: Quick Reference Cards

Change Summary

Changes made to this document are summarized in the following table

| DATE | CHANGE REASON FOR CHANGE | | Changed Pgs |
|----------|---|---|-------------|
| 04/01/03 | Change in task from Change Miscellaneous Benefit Plans – Post Tax to Cancel Post-tax Benefit Plans | Miscellaneous Benefit Plans by EBD – Post Tax to Cancel Post-tax | |
| 04/01/03 | Effective date for cancellation of Post-tax Benefit Plan | Change in policy by EBD | 12 |
| 04/01/03 | Change in process from Change in Optional Life Amount to Cancel Post-tax Optional Life Amount | Change in policy by EBD | 17 |
| 04/01/03 | Change in process from Change in Dependent Life Amount to Cancel Post-tax Dependent Life Amount | Change in policy by EBD | 17 |
| 04/01/03 | Change in process from Change Post-Tax Benefit Plan to Cancel Post-Tax Benefit Plan | Change in policy by EBD | 17 |
| 04/01/03 | Deleted process Enroll in Post-Tax Benefit Plan (Misc. Benefit Change) | Change in policy by EBD | 17 |
| 04/01/03 | Pages re-numbered | Additional page needed | 3-20 |





Version Control Sheet

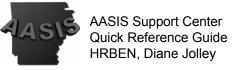
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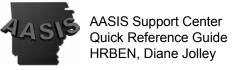
| DATE | CHANGE | REASON FOR CHANGE | Changed Pgs |
|----------|--|--|-------------|
| 10/09/03 | Change in procedure for enrolling employee in the Basic Employee Life plan | Change in procedure | 6,9 & 13 |
| 10/09/03 | Changed note to reflect effective date must be within current fiscal year. | Change in procedure by OPM/State Payroll | 17 |
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QUICK REFERENCE CARD INDEX

| QRC# | Definition | Page # |
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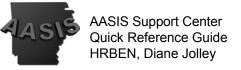




QRC 1 - Benefits Administration Transactions

(Pg 1 of 3)

| TASK | MENU PATH | TRANSACTION CODE |
|--|--|---------------------|
| Create Benefit Enrollment - Rehire | Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) | PA30 |
| Create A Dependent Record | Human Resources > Personnel Management > Administration > HR Master Data > Maintain | PA30 |
| Create New Hire Benefit Enrollment - Employee Elections and Basic Employee Life Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) and Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001) | | PA30/HRBEN0001 |
| Create New Hire Benefit Enrollment - Automatic Plans | Human Resources > Personnel Management > Benefits > Enrollment | HRBEN0001 |
| Add Additional Child to Benefit Plan | Human Resources > Personnel Management > Administration > HR Master Data > Maintain | PA30 |
| Correct Employee Benefit Enrollment Elections | Human Resources > Personnel Management > Benefits > Enrollment | HRBEN0001 |
| Create Benefit Enrollment - HIPAA Special Enrollment Special Enrollment Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) and Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001) | | PA30/HRBEN0001 |
| Display Employee Benefit Data | Human Resources > Personnel Management > Administration > HR Master Data > Display | PA20 |
| Stop Participation for One of Several Children Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001) and Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) | | HRBEN0001 / PA30 |

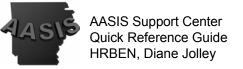




QRC 1 – Benefits Administration Transactions

(Pg 2 of 3)

| TASK | MENU PATH | TRANSACTION CODE |
|--|--|---------------------|
| Generate Changes in Benefits Elections Report | Human Resources > Personnel Management > Benefits > Info System > Reports > Participation > Changes in benefits Elections | HRBEN0077 |
| Changes in Eligibility Report | Human Resources > Personnel Management > Benefits > Info System > Reports > Participation > Eligible Employees | HRBEN0079 |
| Eligible Employee Report | Human Resources > Personnel Management > Benefits > Info System > Reports > Participation > Eligible Employees | HRBEN0071 |
| Health Plan Costs Report | Human Resources > Personnel Management > Benefits > Info System > Reports > Costs and contributions > Health plan costs | HRBEN0073 |
| Record Evidence of Insurability | Human Resources > Personnel Management > Benefits > Insurability (HRBEN0004) and Human Resources > Personnel Management > HR Master Data > Maintain (PA30) | HRBEN0004/PA30 |
| Participation Report | Human Resources > Personnel Management > Benefits > Info System > Reports> Participation | HRBEN0072 |
| Display Overview of Benefit Plan Data | Human Resources > Personnel Management > Benefits > Overview | HRBEN0006 |
| Run Headcount Changes Report | Human Resources > Personnel Management > Administration > Info System > Reports > Employee > Organizational Entity > Headcount Changes | S_L9B_07000180 |
| Time Evaluation Message Display Report | Human Resources > Time Management > Administration > Time Evaluation > Time Evaluation Messages | S_PH9_46000588 |

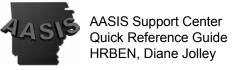




QRC 1 - Benefits Administration Transactions

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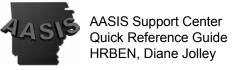
| TASK | MENU PATH | TRANSACTION CODE |
|--|---|---------------------|
| Monitor Eligibility | Human Resources > Personnel Management > Benefits > Eligibility | HRBEN0003 |
| Print Confirmation Form | Human Resources > Personnel Management > Benefits > Forms > Confirmation | HRBEN0015 |
| Change Employee Optional Life Benefits | Human Resources > Personnel Management > Administration > Benefits > Enrollment | HRBEN0001 |
| Enroll Benefit Plan During Open Enrollment | Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) and Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001) | PA30/HRBEN0001 |
| Stop Participation for One of Several Children | Human Resource > Personnel Management > Benefits > Enrollment (HRBEN0001) and Human Resources > Personnel Management > HR Master > Maintain (PA30) | HRBEN0001/PA30 |
| Employee Voluntary Increase of Optional Life Coverage Exceeding \$40,000 | Human Resources > Personnel Management > Administration > HR Master Data > Maintain | PA30 |
| Terminate Benefit Coverage | Human Resources > Personnel Management > Benefits > Termination | HRBEN0014 |
| Insurance Plan Costs Report | Human Resources > Personnel Management > Benefits > Info System > Reports> Costs and contributions > Insurance plan costs | HRBEN0074 |
| Perform Benefits DROP | Human Resources > Personnel Management > Benefits > Termination | HRBEN0014 |





QRC 2 – Benefits Administration Maintain Employee Benefits Data (Page 1 of 2)

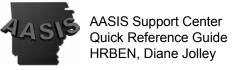
| TASK | MENU PATH | TRANSACTION CODE | |
|---|--|---------------------|--|
| Create New Hire Benefit Enrollment - Automatic (Savings) Plans | Human Resources > Personnel Management > Benefits > Enrollment | HRBEN0001 | |
| Create New Hire Benefit Enrollment - Employee Elections and Basic Employee Life Plan | t Human Resources > Personnel Management > Administration > HR Master Data > Maintain (add dependents and provide benefits medical information such as PCP. | | |
| | Human Resources > Personnel Management > Benefits > Enrollment Enroll employee and dependent(s) if applicable in requested state sponsored plans and in the Basic Employee Life plan. | HRBEN0001 | |
| Record Evidence of Insurability | Human Resources > Personnel Management > Benefits > Insurability | HRBEN0004 | |
| | Human Resources > Personnel Management > Administration > HR Master Data > Maintain (Change the 'From' date for the optional insurance plan located in infotype 0168 Insurance Plans to the beginning date of the pay period in which the approved coverage should be deducted. Also, change the 'Participation' date to the effective date of coverage supplied by the Insurance provider). | PA30 | |
| Correct Employee Benefits Enrollment Elections | Human Resources > Personnel Management > Benefits > Enrollment | HRBEN0001 | |
| Display Employee Benefit Data | Human Resources > Personnel Management > Administration > HR Master Data > Display and select the appropriate tab and infotype | PA20 | |
| Create Dependent Record | · | | |





QRC 2 – Benefits Administration Maintain Employee Benefits Data (Page 2 of 2)

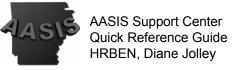
| Task | Menu Path | Transaction Code |
|--|---|------------------|
| Create Benefit Enrollment – HIPAA Special Enrollment | Human Resources > Personnel Management > Administration > HR Master Data > Maintain (add dependents and provide benefits medical information such as PCP. Create Adjustment Reason. Once Adjustment Reason is created AASIS will ask you if you want to go to enrollment now. Click yes. If you click no then use the menu path below to access enrollment later.) | PA30 |
| | Human Resources > Personnel Management > Benefits > Enrollment Enroll employee and dependent(s) if applicable in requested state sponsored plans. | HRBEN0001 |
| Cancel Post-Tax Benefit Plans | Human Resources > Personnel Management > Administration > HR Master Data > Maintain (add dependents and provide benefits medical information such as PCP. Create Adjustment Reason. Once Adjustment Reason is created AASIS will ask you if you want to go to enrollment now. Click yes. If you click no, then use the menu path below to access enrollment later.) | PA30 |
| | Human Resources > Personnel Management > Benefits > Enrollment Enroll/Change employee and dependent(s) if applicable in requested state sponsored plans. | HRBEN0001 |
| Print Confirmation Form | Human Resources > Personnel Management > Benefits > Forms > Confirmation | HRBEN0015 |
| Terminate Benefits Coverage | Human Resources > Personnel Management > Benefits > Termination | HRBEN0014 |





QRC 3 – Benefits Administration Infotypes (Page 1 of 2)

| Infotype | Number | Description |
|---------------------------------|--------|---|
| General Benefits Information | 0171 | This infotype stores the employee's Benefit area as well as their 1 st and 2 nd programming group. This information defaults in from the Organizational Assignment infotype (0001) and determines the benefits for which an employee is eligible. |
| Adjustment Reason | 0378 | This infotype processes an employee's benefits adjustments. A benefit adjustment is the reason why an employee must make changes to his or her benefit elections. An adjustment reason must be recorded prior to making a change in an employee's benefits. Examples include New Hire, Family Status Change, and so on. |
| Family/Related Persons | 0021 | This infotype stores the data of an employee's family members, other related persons, as well as emergency contact information. During Benefits enrollment, all eligible dependents in this infotype are displayed and can be attached to applicable plans. |
| Benefits Medical Information | 0376 | This infotype stores an employee's and their dependent's primary care physician information as well as smoker designation. |
| Health Plans | 0167 | This infotype contains the employee's benefit plan, calculation dates, options, dependent coverage, covered dependents, and cost information. |
| Insurance Plans | 0168 | This Infotype contains the general plan data, calculation dates, options selected, benefits/ salary insurance coverage amounts, eligibility information, proof of insurability requirements, and cost information. |
| Flexible Spending Accounts | 0170 | This infotype contains the calculation date and annual contribution amount for Medical and Dependent Care Spending Accounts, as well as, the minimum and maximum employee contribution guidelines. |
| Savings Plans | 0169 | This infotype contains the calculation date and employee and employer contribution amount/ percentage for these plans. |



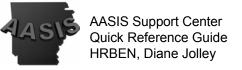


QRC 3 – Benefits Administration Infotypes (Page 2 of 2)

| Infotype | Number | Description |
|------------------------------|--------|--|
| Organizational Assignment | 0001 | This infotype contains detailed information about an employee's position in the organization, including the position number, personnel area, personnel subarea, business area, payroll area, employee group and employee subgroup. |
| Actions | 0000 | This infotype contains a history of all of the personnel actions that have been performed for the employee. This infotype contains the employee's Hire Date. |
| Additional Personal Data | 0077 | This infotype can be used to track an employee's ethnic origin, military status, veteran status, and any disability. |
| Personal Data | 0002 | This infotype enables you to update an employee's marital status prior to creating/ updating a spouse's Family/ Related Person (dependent) record. |
| Addresses | 0006 | This infotype enables you to record an employee's home, work, and emergency addresses. |
| Date Specifications | 0041 | This infotype enables you to keep track of the employee's original hire date, latest hire date, career service date, vesting date, and other important dates. |
| Basic Pay | 0008 | This infotype enables you to view an employee's annual salary. |

Adjustment Reason Subtypes

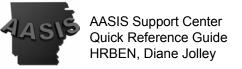
- •Family Status Change
- •HIPAA
- •New Hire Enrollment
- •Transfer (Rtr. Plans)
- •Transfer (All Plans)
- •Return from LWOP
- Misc Benefits Changes
- Promotion/ Demotion
- •Rehire





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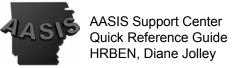
| Enrollment or Benefits Change Transaction: | PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable | PA30- Maintain Master Data Adjustment Reason (0378) | HRBEN0001- Enrollment | HRBEN0014- Benefits Termination |
|---|---|--|---|---|
| New Hire (Automatic Plans) | Hire Date | Hire Date | Hire Date | Not applicable |
| New Hire Enrollment (Employee Elections and Basic Employee Life) | Hire Date | Not applicable | Date of application | Not applicable |
| Family Status Changes | HANDLED BY EBD | | | |
| Change in Savings Plan Contributions (Anytime changes) | Not applicable | Not applicable | Effective date is the beginning of the pay period in which the change should be made active | Not applicable |
| Change in Miscellaneous Benefit Plan (Post-tax) | Not applicable | Date of Change in Coverage | Date of Change in Coverage | Last day of the month following the cancellation date |
| Adding dependent with no change in deduction (adding newborn to existing children coverage) | Actual birth date or adoption date | Not applicable | Not applicable | Not applicable |





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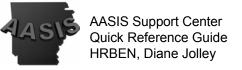
| Enrollment or Benefits Change Transaction: | PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable | PA30-Maintain Master Data Adjustment Reason (0378) | HRBEN0001- Enrollment | HRBEN0014- Benefits Termination |
|--|---|---|--|---------------------------------------|
| Stop Participation for One of Several Children | Effective date is the 1st of the month after the dependent looses eligibility. | Not applicable | Effective date is the 1st of the month after the dependent loses eligibility. | Not applicable |
| HIPAA Change | Event Date | Effective Date of Coverage will be the 1st day of the month following the application date and must be within 30 days of the HIPPA event. | Effective Date of Coverage will be the 1 st day of the month following the application date and must be within 30 days of the HIPPA event. | Not applicable |
| Open Enrollment | Date of application within Open Enrollment period | Not applicable for open enrollment | Date of application, within Open Enrollment period | Not applicable |





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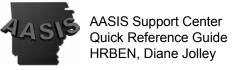
| Enrollment or Benefits Change Transaction: | PA30-Maintain Master Data Insurance Plans (0168) | PA30-Maintain Master Data Insurance Plans (0168) Administration Tab / Participation Date | HRBEN0004 – Evidence of Insurability | HRBEN0014 - Benefits Termination |
|--|---|--|--|--|
| Record Evidence of Insurability | Effective date will be either the date of original application, or the first day of the pay period in which the approved coverage should be deducted. NOTE: For New Hires, the Hire date is the earliest possible date that may be entered. | Effective date of coverage supplied by Insurance Provider. NOTE: Participation may not need to be changed, especially for New Hires. | Effective date will be the first day of the pay period in which the approved coverage should be deducted. NOTE: For New Hires, the Hire date is the earliest possible date that may be entered. | Not applicable |
| Employee Termination of benefits due to employment termination | Not applicable | Not applicable | Not applicable | Last day worked (system calculates using payroll rules based on last day worked). Refer to the BPP for Terminate Benefit Coverage. |





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| Enrollment or Benefits Change Transaction: | PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable | PA30- Maintain Master Data Adjustment Reason (0378) | HRBEN0001 -Enrollment | HRBEN0014 - Benefits Termination |
|---|---|--|--------------------------|---|
| Employee Termination of benefits due to employee signed a cancellation form | Not applicable | Not applicable | Not applicable | Enter date the employee signed the cancellation form. Refer to the BPP for Terminate Benefit Coverage |
| Termination of benefits due to non-payment | Not applicable | Not applicable | Not applicable | Enter the employee's last day of coverage. Refer to the BPP for Terminate Benefit Coverage. |
| Rehire - No break in coverage | Refer to EBD | Refer to EBD | Refer to EBD | Not applicable |
| Rehire - Break in coverage | Date of Re-hire | Date of Re- hire | Date of Re- hire | Not applicable |
| Transfer- Retirement Plans only (Change) | Not applicable | Date of Transfer | Date of Transfer | HANDLED BY EBD |

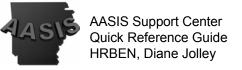




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| Enrollment or Benefits Change Transaction: | PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable | PA30-Maintain Master Data Adjustment Reason (0378) | HRBEN0001- Enrollment | HRBEN0014- Benefits Termination |
|--|---|---|--------------------------|--|
| Transfer – All Benefits (Change) | Not applicable | Date of Transfer | Date of Transfer | HANDLED BY EBD |
| DROP | Not applicable | Not applicable | Not applicable | Last day the employee is eligible for Retirement benefits. |

Remember: The effective date MUST be within the current fiscal year. If it is necessary for the agency to have Master Data corrected beyond the current fiscal year, the agency must send a request with justification to Micki Poteet at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.

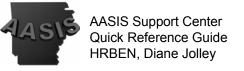




QRC 5 – Benefits Administration - Changes

(Page 1 of 1)

| Change to be Processed | Role Performing Process | PA30 Adjustment Reason needed. | BPPs Used |
|--|-------------------------------|--------------------------------------|---|
| Creation of Dependent without deduction change (adding second child) | Agency Benefits Specialist | None | PA30 Create Dependent Record PA30 Add Additional Child to Benefit Plan |
| Change in Savings plan contributions 457, 403B Vol. | Agency Benefits Specialist | None | HRBEN0001 Anytime Change |
| Cancel Post-Tax Optional Life Amount | Agency Benefits Specialist | Misc. Benefit Chg. | PA30/HRBEN0001 Change Miscellaneous Benefit Plans |
| Cancel Post-Tax Dependent Life Amount | Agency Benefits Specialist | Misc. Benefit Chg. | PA30/HRBEN0001 Change Miscellaneous Benefit Plans |
| Cancel Post-Tax Benefit Plan | Agency Benefits Specialist | Misc. Benefit Chg. | PA30/HRBEN0001 Change Miscellaneous Benefit Plans |
| Enroll or Change Pre-Tax Plan | State Benefits Specialist | Family Status Change | Processed by EBD |
| Termination due to Employment Termination | Agency Benefits Specialist | None | HRBEN0014 Terminate Benefits Coverage |
| Divorce-Post Tax Plans | Agency Benefits Specialist | Misc. Benefit Chg. | PA30/HRBEN0001 Stop Participation for Divorced Spouse |
| Child becoming ineligible-Pre-Tax Plans | State Benefits Specialist | Family Status Change | FSC handled by EBD |
| Child becoming ineligible-Post-Tax Plans | Agency Benefits Specialist | Misc. Benefit Chg. | PA30/HRBEN0001 Stop Participation for Ineligible Child |
| Child becoming ineligible-No deduction affected. | Agency Benefits Specialist | None | HRBEN0001/PA30 Stop Participation for One of Several Children |



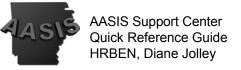


QRC 6 — Benefits Administration - Reports (Page 1 of 3)

IMPORTANT:

Remember to limit these reports to your own agency. Instructions are included in the Dependencies of most BPPs. They are as follows: Click on the "Further selections" tab on the first screen. A pop-up window will appear. You may then click on the box in front of the "Personnel area" and click the forward arrow to move this choice to the "Selection fields". Green check at the bottom of this window. This will add a new field, "Personnel area" to your screen. Enter the first two digits of your agency's personnel area followed by two asterisks (**) For Example: for DFA you would use FA** to find all values for this department.

| Report name | Menu path | Transaction code | Report results | When to perform report |
|-----------------------|--|------------------|--|------------------------------|
| Eligible employees | Human resources > personnel management > benefits > info system > reports >participation >eligible employees | HRBEN0071 | Lists all employees eligible for a particular benefit plan | As needed |
| Participation report | Human resources > personnel mgmt>benefits > info system > reports > participation > participation | HRBEN0072 | Listing of all employees enrolled in benefit plans | As needed |

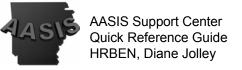




QRC 6 – Benefits Administration - Reports

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| Report name | Menu path | Transaction code | Report results | When to perform report |
|--------------------------|---|---------------------|---|---|
| Health plan costs report | Human resources > personnel mgmt > benefits > info system > reports > costs & contributions > health plan costs | HRBEN0073 | Listing by employee, by health plan of employee cost, employer cost and provider cost | As needed may be used to calculate an agency's total health plan costs |
| Monitor eligibility | Human resources > personnel management > benefits > eligibility | HRBEN0003 | Listing by employees who are no longer eligible for a plan(s) in which they are enrolled in. Also employees who are enrolled in plans with co- requisite plans in which they are not enrolled | Monthly |
| Changes in eligibility | Human resources > personnel mgmt > benefits > info system > reports > participation > changes in eligibility | HRBEN0079 | Listing of employees who are no longer eligible for a plan(s) in which they are participating. | Recommended monthly |





QRC 6 – Benefits Administration - Reports

(Page 3 of 3)

| Report Name | Menu Path | Transaction Code | Report Results | When to Perform Report |
|--|---|------------------|--|--|
| Insurance plan costs | Human resources > personnel mgmt > benefits > info system > reports > costs & contributions > insurance plan costs | HRBEN0074 | Listing by employee, by insurance plan of employee cost, employer cost and provider cost | As needed May be used to calculate an agency's total insurance plan costs. |
| Time evaluation Message display Report | Human resources>time Management>administ ration>time evaluation>time evaluation messages | S_PH9_46000588 | Message error #ZF displays list of employees whose total work hours are less than scheduled planned hours each pay period. | Quarterly |
| Deductions not taken report | Sap menu | ZPYUSR0003 | Listing of employees who are actively on the payroll but did not have benefit deductions taken during a specific pay period. | Bi-weekly - the day after payrolls have been run. |
| Headcount changes report | Human resources> personnel management > administration > info system >reports >employee >organizational entity >headcount changes | S_L9B_07000180 | Listing of employees who have had a personnel action processed on them, such as drop, etc. | As needed |